

TEACHERS' RETIREMENT BOARD
BENEFITS AND SERVICES COMMITTEE

SUBJECT: Customer Inquiry and Response System

ITEM NUMBER: 9

ATTACHMENT(S): 1

ACTION:

DATE OF MEETING: July 11, 2002

INFORMATION: X

PRESENTER(S): Michael Carter

At the previous Benefits and Services meeting the Committee requested staff to report on the process for tracking member inquiries. Staff acknowledges that this is an area where improvement is needed and the following report identifies corrective action. We are adopting a 100 percent goal of acknowledging the members' request or informing the member of the status of the issue. However, somewhat problematic is the nature of acknowledging our backlogged inquiries as compared to newly received inquiries. The attachment provides a brief description of the points of contact. A more detailed report of our tracking and management system will be provided at the meeting.

Member Communication Procedures Response, Follow-up and Tracking System

PSO receives member communication from various mediums. These include:

Phones

E-mails

Correspondence

Executive calls (calls that do not go through normal channels—i.e., the executive office, legislators, the ombudsman, CTA, etc.)

1215s (internal follow up method)

Work orders

Billings

Phones

Calls requiring an action, such as sending a brochure, form, ordering service credit breakdown, or additional follow-up with other program areas (1215s) will be tracked on both event tracking and the member contact tracking system (Chris' system).

Current related performance goal: Answer 95 percent of calls in 3 minutes. (Currently we are at 86 percent).

1215s

1215s are generally used to request member assistance from other program areas. When a 1215 is sent to another area, it is recorded on event tracking. If a member calls back after 15 days have elapsed, a second 1215 is sent and recorded. Once the member request has been filled, it is recorded on event tracking. The 1215s will eventually be logged on both event tracking and the member contact tracking system for aging reports, counts, etc.

E-Mails

Currently when a member contacts PSO via e-mail, they receive an immediate message stating that we have received their e-mail, and that they can expect a response in 7-10 days. These e-mails are tracked on an internal PSO spreadsheet by member name, SSN, date received, date completed, and tech assigned to. When PSO completes an e-mail, it is logged on event tracking and logged as completed on the PSO spreadsheet. If an e-mail requires the assistance of another program area, they are sent through internal mail to that area, and it is noted on the spreadsheet.

The other program area then completes and logs this on event tracking. When completed they are put on the CAR System. Eventually, these will be tracked on Chris' system for better reporting mechanisms.

Current related performance goal: Complete 100 percent of e-mails in 10 days and 75 percent in 3 days. (Currently we are at 89 percent and 61 percent, respectively.)

Correspondence

Correspondence received in PSO is logged on an internal spreadsheet, with the same information as noted for e-mails. When completed, it is logged on event tracking and the PSO spreadsheet. It is sent to the CAR System. If correspondence needs to be redirected it is entered into the log notes. When correspondence is completed by another area, it is logged onto event tracking and sent to the CAR System.

Current related performance goal: Complete 90 percent of correspondence in 10 days. (Currently we are at 46 percent.)

Executive Calls

These calls are handled by PSO supervisors and team leaders. The calls are tracked on a very basic log. These will be entered into the member contact tracking system. Currently, we are receiving 20 to 25 per month. There are no formal goals related to this activity. However, most are completed in no more than three days.

Work Orders

When attempting to resolve members' reporting issues, a work order is sent to Membership. This is logged on event tracking. If the issue is urgent, it is elevated to a Manager in Membership for resolution.

Billings

BSU receives billing requests and they are logged onto a spreadsheet similar to the e-mail and correspondence spreadsheet. When the billings are completed, it is logged onto event tracking and the internal spreadsheet, and sent to the CAR System. Eventually, these will be logged onto the member contact tracking system.

BSU is developing a response postcard for members acknowledging the receipt of their billing request, and stating an expected date for completion.

Currently there is no formal performance-billing goal. However, until recently, billing requests were processed on a 30-day flow basis. There are approximately 3,200 outstanding billing requests at this time.